



Meeting Date: February 18, 2021

Submitted By: Dr. Nicole Taguinod
Title: Chief Communications Officer

Agenda Item: Judson Education Foundation 2020 State of the Foundation

DISCUSSION ITEM

RECOMMENDATION:

It is recommended that the Board of Trustees be presented with a report on the State of the Foundation over the 2020 year. Because the Judson Education Foundation raises funds to support innovative teacher and principal grants and student scholarships for the students of Judson ISD, it is important for the Board to be kept abreast, each year, of the impact that the foundation is having on the district.

Judson Education Foundation

2020 State of the Foundation

Current Balances as of December 31, 2020 in Accounts:

Operations Account	\$ 69,043.80
Operations Emergency Savings	\$ 14,901.92
Operations MM	\$ 15,338.92
Emergency Savings	\$ 5.00
JLA/GED	\$ 25,103.01
BBVA Compass – Business Checking	<u>\$ 46.00</u>
Total All Accounts:	\$124,438.65

JEF Donations in Scholarships and Grants 2020

Employee Gift Cards totaling:	\$155,000.00
15 Student scholarships totaling:	\$ 30,000.00

JEF Fundraiser Events and Campaigns 2020

	INCOME	EXPENSES	PROFIT
Gala	\$ 42,545.00	\$ 26,835.19	\$ 15, 709.81
Youth Football Camp	\$ 60.00	\$ 0	\$ 60.00
Golf Tournament	\$ 0	\$ 0	\$ 0
E-Give Campaign	\$ 11,968.00	\$ 2,553.20	\$ 9,414.80
United Way Campaign	\$ 6,414.91	\$ 142.11	\$ 6,272.80
Jingle Bell Jamboree	\$ 0	\$ 0	\$ 0
5K Fun Run	\$ 2,120.00	\$ 464.50	\$ 1,655.50

Current Investment

	ACCOUNT VALUE
Orion (formerly known as AmeriTrade)	\$1,131,662.82

Activity Summary

	QTD	YTD
Beginning Market Value	\$1,022,974.05	\$1,133,588.75
Contributions	\$ 0.00	\$ 0.00
Distributions	\$ 0.00	(\$ 117,000.00)
Transfer In/Out	\$ 0.00	\$ 0.00

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	QTD	YTD
Market Value Increase	\$ 108,576.50	\$ 114,961.80
Ending Market Value	\$1,131,550.55	\$1,131,550.55

Performance Summary

Time Period	IRR
QTD	10.64%
YTD	11.19%
1 YEAR	11.19%
3 YEAR	6.81%
5 YEAR	7.76%
10 YEAR	N/A
Since Inception (11/10/2015)	7.10%

Top 10 Largest Donors of 2020

Company/Organization Name	Total Given
Gravelly Attorney and Counselors	\$ 25,000.00
FirstMark Credit Union	\$ 10,000.00
Alamo Insurance Group	\$ 6,500.00
Forde-Ferrier LLC Mastery Learning	\$ 4,100.00
DOCUmentation	\$ 2,000.00
Edgenuity	\$ 2,000.00
Frost Bank	\$ 2,000.00
Garza, Bomberger & Associates	\$ 2,000.00
Linebarger, Groggan, Blair & Simpson	\$ 2,000.00
Walsh, Gallegos, Trevino, Russo & Kyle	\$ 2,000.00
Total	\$57,600.00